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AUTHOR Roughton, Anne; Powers, Audrey
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ABSTRACT

This is a revision of a guide (IR 003 265) for planning a library workshop. It is presented in five parts: (1) the workshop planners, (2) planning the program, (3) the day of the workshop, (4) evaluation and followup, and (5) information sources. The major part of the guide is concerned with program planning and covers needs assessment, objectives, audience definition, selection of time and place, equipment and materials, presentation techniques, speakers, budgeting, kit materials, display plans, announcements, and agenda. Most of the instructions are given in outline form as check lists, questions, or brief directions. (DAG)

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# AN OUTLINE OF HOW TO PLAN A WORKSHOP*

Revised edition 8/76

Workshop
"An instructional method in which persons with common interests and problems meet with appropriate specialists to acquire necessary information and develop solutions through group study."
(*Dictionary of Education*, 3d ed.)

*Workshop
"A course or discussion group which emphasizes the exchange of ideas and the demonstration of methods and practical application of skills and principles mainly for adults employed in the field."
(CLENE)

*Workshop
"A gathering of individuals with a common learning goal that can be achieved through guided instruction and exercise in a brief period of time."
(Tulsa. *Workshop Manual*)

*Workshop
"A seminar, discussion group, or the like, which emphasizes exchange of ideas and the demonstration and application of techniques, skills, etc."
(*The Random House Dictionary of the English Language*)

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Written and edited by:
Anne Roughton, BARC Workshop Coordinator
Audrey Powers, BARC Reference Librarian

Ably aided and abetted by:
Bonnie Jo Dopp
Gil McNamee
Dan Maurer
Gilda Turitz
of the BARC staff

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# I. THE WORKSHOP PLANNERS

The planning group which will plan your workshop may be:

A decentralized committee.

A coordinated group working together.

An individual person - who will always need some help from the library staff.

In addition to members of the library and/or system staff the planning group might include:

Subject specialists.

Consultants from the State Library.

Someone from BARC.

Librarians from other libraries or systems.

Members of the community.

I. THE WORKSHOP PLANNERS, continued

The planning group should begin planning three or four months before the workshop. They will want to divide responsibilities for:

Overall coordination

Program planning

Program implementation/Overseeing arrangements

Publicity

Kit materials

Displays

Evaluation

Follow-up

Helpful hints from those who have been there:

*"When having a planning committee meeting ALWAYS HAVE AN AGENDA."*
--Ohio Library Association. Workshop by design. 1975.

*"INADEQUATE PLANNING AND PREPARATION RESULT IN MORE PROGRAM FAILURES THAN ANY OTHER SINGLE CAUSE."*
--Barbara Conroy. Staff development and continuing education programs for library personnel: guidelines and criteria. WICHE, 1974.

# II. PLANNING THE PROGRAM

## A. ASSESSING NEEDS

or

What should the topic of the workshop be?

To decide on a topic the planning committee might:

Send out a questionnaire to staff.

Have a brainstorming session.

Talk informally with staff members (and not just administrators please).

Look around the library for "problem" areas.

Survey professional literature.

All of the above.

*"THE ASSESSMENT OF NEEDS SHOULD MEASURE THE DIFFERENCE BETWEEN WHAT IS GOING ON NOW AND WHAT SHOULD GO ON EITHER NOW OR IN THE FUTURE. 'NEEDS' CAN BE DEFINED AS THE GAP BETWEEN THE PRESENT LEVEL AND DESIRED (OR REQUIRED) LEVEL OF ABILITY OF INDIVIDUALS OR OF THE ORGANIZATION IN MEETING ITS RESPONSIBILITIES."*

--Barbara Conroy. Staff development and continuing education programs for library personnel: guidelines and criteria. WICHE, 1974.

II. PLANNING THE PROGRAM, continued

A. ASSESSING NEEDS, continued

Make a list of possible workshop topics.

Decide which topics are high priority items.

Decide whether having a workshop would be an appropriate way of handling the topic. Consider these factors:

Target audience: who needs to know what? how many people involved?

Level and amount of material to be learned - is topic manageable?

Learning vs. non-learning needs of library and of staff.

Commitment to topic - by potential audience and by library administration.

Consider alternatives to the workshop format:

Individual training or supervision (one-to-one basis)

Continuous on-the-job training

Institute

Formal coursework

II. PLANNING THE PROGRAM, continued

B. PREPARING WORKSHOP OBJECTIVES

Goals vs. Objectives

Goals are statements of a desired, but not necessarily achievable condition.
Goals are: 1. Long-range 3. Timeless
2. Broad in scope 4. Not measurable

Objectives specify the results which the training is intended to achieve.
Qualities of meaningful objectives:

1. Important, not trivial.

2. Clear, concise, unambiguous, understandable, specific statements.

3. Stated in behavioral or performance terms.

| Use concrete, action verbs like: | | Avoid verbs that are vague, or describe actions which cannot be observed - verbs like: | |
|---|---|---|---|
| write | explain | know | grasp the significance of |
| choose | compare | understand | analyze |
| identify | contrast | learn | develop |
| list | submit | appreciate | |

4. Measurable. An observer should be able to clearly see when the objective has been fulfilled. It should state what evaluation standard is to be applied in appraising performance.

5. Include time frame, such as a target date for fulfilling the objective.

6. Realistic, feasible, attainable.

7. Controllable. The opportunity for fulfilling the objective must be reasonably within the control of the person running the workshop and of those attending.

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EXAMPLES

GOAL: To understand the library's circulation system.
OBJECTIVE: At the end of the 1-day training program, the learner will be able to list & perform the 10 steps involved in checking out a book.

GOAL: To make information readily accessible to all members of the community.
OBJECTIVE: Library clientele will be increased by 500 new users during fiscal year 1976-77.

GOAL: To improve the economic status of San Francisco's citizens through provision of information services.
OBJECTIVE: Use of library by the business community will increase by 25% in a 12-month period.

II. PLANNING THE PROGRAM, continued

B. PREPARING WORKSHOP OBJECTIVES, continued

*"Program objectives give direction to the efforts expended on the program--they are a blueprint for action. Sound objectives provide a firm basis for the decisions--program planning, setting policies and procedures, evaluating the outcomes--that will be necessary at each stage of the program development subsequent to this one. Objectives must be based on the needs discovered and must be in accord with the goals of the organization.*

*"THE PROCESS OF SETTING OBJECTIVES HELPS TO ORGANIZE THINKING, TO CHECK OUT ASSUMPTIONS AND TO ASSURE THAT THE VARIOUS ORGANIZATIONAL ELEMENTS ARE UNDERSTANDING AND WORKING TOGETHER TOWARD THE SAME GOAL. They are a prime means of communicating within and outside the organization about what is being attempted and achieved. They indicate the criteria by which the program can be evaluated--to what degree have we achieved our objectives?"*

--Barbara Conroy. Staff development and continuing education programs for library personnel: guidelines and criteria. WICHE, 1974.

For additional information see Source List, p. 23.

Conroy, p.7-8.
Davis and McCallon, Ch.2.
Sheldon
Warncke, Ch.4.

II. PLANNING THE PROGRAM, continued

C. DEFINE YOUR AUDIENCE

Who is coming to your workshop? Once this is known, plan some means of communication between the planners and the people who will attend the workshop. Possible methods are:

1. Written questionnaire distributed to all who will attend.

2. Preworkshop meeting with all or some of the people who will be attending the workshop.

3. Interview individuals (in person or by phone) who will be attending.

Some of the things you will want to find out are:

1. Do participants come from same or different working levels in the organization?

2. How varied is their understanding of, or experience with, the topic?

3. What teaching/learning methods do they like? Lecture? Role play? Small group discussions? etc.

4. What are their expectations? Why are they planning to attend the workshop?

You may want to ask all attendees to read designated materials before coming to the workshop. (Note: If you choose this method, be sure all attendees will have access to the materials. Consider sending photocopies of articles.)

II. PLANNING THE PROGRAM, continued

D. PICK THE TIME AND PLACE

TIME: Check for conflicting meetings, conferences, workshops, etc. (CLA keeps a master calendar of upcoming library activities.)

Avoid holiday periods.

Avoid peak vacation times.

Check for major cultural and sporting events which might draw away potential workshop attendees.

PLACE: Try to choose a location that will be the most convenient for the majority of workshop participants.

Some things to consider when choosing a location:

How many people does the room hold?

Is the room comfortable and pleasant?

Are there outlets for the audiovisual aids and electrical equipment which will be used?

Is parking available?

If films or video will be shown, can the windows be blacked out?

Can coffee be served easily?

Is there a place for lunch nearby?

Is exhibit space available?

Is the room airconditioned?

Reserve the meeting room(s) AS EARLY AS POSSIBLE. Make arrangements for custodial services (special seating arrangements, placement of tables, accessibility to the room if building not usually open, etc.)

II. PLANNING THE PROGRAM, continued

E. SELECT PRESENTATION TECHNIQUES

Presentations made to a group

- Lecture
- Debate
- Interview
- Panel
- Role play
- Demonstrations
- Skits
- Symposium
- Pantomime

Group learning

- Discussion groups
- Role play
- Games
- Problem solving work sessions
- Case studies for discussion
- Demonstrations
- Brainstorming
- Non-verbal group project (Painting, drawing, constructing)

Audio visual presentations

- Films
- Slides
- Filmstrips
- Video
- Audio tapes
- Records
- Multi-media
- Overhead projector
- Opaque projector
- Exhibits
- Posters
- Blackboard

And don't forget

- Kit materials
- Preworkshop reading suggestions

II. PLANNING THE PROGRAM, continued

F. PLAN FOR EQUIPMENT AND MATERIALS

Will you be using:

Films

Projector

Screen

Microphones

Videotapes

Television set and video playback equipment

Slides

Slide projector

Blackboard

Tables

Chairs

Maps

Lectern

Flip chart

Tape recorder

For whatever you will be using:

Reserve (projectors, chairs, etc.) early.

Order (films, tapes, slides) early.

Buy or make (maps, flip charts) early.

Find out who knows how to operate the machines.

Test equipment in advance to be sure it is working. Allow time for replacement or repair.

Are there adequate electrical outlets available, or will extension cords and 3-prong adaptors be needed?

Make sure there are spares--bulbs for projectors, etc.

See that there is chalk and an eraser for the blackboard.

Will masking tape be needed? or tacks?

II. PLANNING THE PROGRAM, continued

G. SPEAKERS

These may be chosen from:

Library personnel

State Library personnel

Local college and university staff people

Experts in the field

Issue-oriented community groups

Library trustees and commissioners

Business contacts

Local or state government agencies

Library schools

MAKE SURE THE PERSON IS A GOOD SPEAKER!
(By reputation or assessments of those who have heard her/him speak)

Contact the speaker early. In the first letter, or during the first phone call, the following points should be covered:

Who's giving the workshop.

Nature and purpose of the workshop.

Time, date and place of meeting.

Why s/he is considered an appropriate person for this job.

Background and number of people attending workshop.

Type of presentation expected and amount of time allotted.

When s/he should arrive and what time s/he is to speak.

Contact person, with address and phone number.

Honoraria and expenses.

Inquire about any audiovisual equipment, or other special arrangements, needed for presentation.

Can s/he bring a copy of her/his prepared speech for proceedings?

Does person mind being recorded on audiotape or videotape?

II. PLANNING THE PROGRAM, continued

G. SPEAKERS, continued

The planners will need to know from the speaker:

Title and length of talk or presentation.

Biographical and background information; and photograph, if needed.

Her/his travel arrangements.

Should someone meet her/him at airport (or wherever)?

About one week before the workshop a letter should be sent to the speaker which will include:

A reminder of time, date, and place of meeting.

Transportation and lodging arrangements.

Directions to meeting; or explanation of who will meet her/him, where and when.

A copy of the agenda.

Sometimes a phone call the day before can be made, if there is any doubt at all about the reliability of the speaker--past no-shows, etc. This should be done tactfully, of course.

II. PLANNING THE PROGRAM, continued

H. BUDGET

Consider the following items which are relevant to your workshop. What will costs be? Who will pay the costs?

Speakers' travel expenses and fees (or honoraria)

Printing and paper costs - for program, invitations or announcements, proceedings, etc.

Postage

Telephone/TWX

Name tags

Workshop kits

Meeting rooms

Lodging and meals for participants

Lodging and meals for staff and speakers

Equipment rental (and film, etc., rental)

Refreshment breaks during the workshop

Travel expenses for committee members and/or persons attending the workshop

Purchase of video or audio tapes

Display materials

AND DON'T FORGET THE ONE MAJOR EXPENSE - COST OF STAFF TIME!

If participants are to pay for the workshop, the Ohio Library Association suggests: *"After the amount of expense to be incurred has been totalled, prorate the cost by the number to attend the meeting, add 20% to determine registration fee."*

And BARC adds to this: It's good to make it clear that registration fees cannot be returned after a certain date. Remember, you will have to pay for all the meals, rooms, etc., which you have ordered.

II. PLANNING THE PROGRAM, continued

I. PREPARE KIT MATERIALS

Decide 4-6 weeks before the workshop what lists, bibliographies, and other handouts will be distributed to participants.

Decide which people will be responsible for preparing items to be included in the kits. If materials have to be ordered, who will do it? Some materials need to be ordered two or three months ahead of time; organizations like ALA are very slow in delivering orders.

Make sure permission is granted for any copyrighted materials used.

Set deadlines when kit materials must be ready for reproduction. Be very strict about this.

Remind those preparing lists and bibliographies to use a consistent bibliographic form. Bibliographic form may vary from list to list, but not within one list.

Decide early who will collect and reproduce kit materials. This can be done in a centralized or decentralized manner. If it is centralized, the materials will be more uniform in appearance and kits will have a more professional look.

Start running off kit materials as soon as they are ready. This will take time and can't all be done the last day.

Kits should be completely collated THE DAY BEFORE THE WORKSHOP, or preferably earlier.

II. PLANNING THE PROGRAM, continued

J. PLAN FOR MATERIALS TO BE INCLUDED IN DISPLAYS

Collect those materials to be used in displays at least several days before the workshop. Display materials might include selected key items included in the kit bibliographies. These displays should be set up just before the workshop begins.

If you plan to make signs and posters to accompany your displays, allow plenty of time to produce them.

Make sure participants know which display materials are theirs for the taking and which materials are "reference only." Take special precautions to safeguard expensive, rare, fragile, and borrowed materials.

Assign specific people to set up and take down the displays.

II. PLANNING THE PROGRAM, continued

K. SEND OUT WORKSHOP ANNOUNCEMENTS

An announcement should be sent to potential attendees 3 to 6 weeks before the workshop is to be held. The announcement should include:

Name of agency giving/sponsoring the workshop.

Exact date(s) and time of workshop.

Location. Including address.

Description of workshop. Be sure objectives are clearly and fully stated. State for whom it is being given and what topics will be covered.

If there is a deadline for registration, state this clearly. If there is a limit to the number of persons who can attend, state this clearly.

How to register for the workshop. Give telephone and/or TWX numbers, address, name of person doing registration.

Cost, if any, and how to make out check. Date after which refunds cannot be made.

Preliminary agenda is sometimes part of an announcement, but need not necessarily be included.

If workshop is scheduled for 2 days, is the program the same, or different, each day? Spell out any specific differences between the programs. These differences may be influential in which day participant chooses to attend.

II. PLANNING THE PROGRAM, continued

L. PLAN THE AGENDA

Divide the time by topic, speaker or activity.

Include enough breaks. Allow enough time for an adequate lunch break.
Roughton's Rules: #1 "People should not be made to sit for more than 45 minutes, but please not more than one hour."
#2 "One hour and 15 minutes is probably the minimum time that should be allowed for lunch."

Plan each segment. Try to have a variety of presentation techniques. Include time for audience reactions to presentations.

Print the agenda as late as possible, so last minute schedule changes can be made.

# III. THE DAY OF THE WORKSHOP

Be prepared. Everything should be ready when the workshop starts. As a rule of thumb, the room, all equipment, displays and materials should be ready 30-45 minutes before the start of the workshop.

Have 2 or 3 people to register attendees. Register people as quickly as possible. Have kits ready and name tags made out ahead of time.

Inform the public service staff of topic, place and time of workshop.

People who are registering attendees should know what to tell people who arrive but who have not preregistered. There may or may not be room for them.

Provide a place for people to hang coats, hats and umbrellas.

Have extra kit materials for people who want additional copies. If you run out, take names and send copies later.

Start on time and end on time.

Keep to the time schedule listed on the agenda, if humanly possible.

Have someone free at all times who can be called upon to "run and get" and help cope with large and small emergencies.

Announce smoking and nonsmoking rules to participants. Announce locations of restrooms.

Be aware if the room is too hot or too cold. Try to remedy the situation (sometimes one can't).

III. THE DAY OF THE WORKSHOP, continued

Have someone watch the room when participants are at lunch, or absent for other reasons.

Have someone assigned to meet the speaker: at the airport
at the door of the meeting room
for meal arrangements

What to do if a speaker does not show up (not necessarily in order given):

Show a movie
Move up agenda
Give a longer break
End early
Have staff member speak
Start a discussion

Workshop leader should have introductions of speakers written out ahead of time.

Have water and drinking glasses for speakers.

Does speaker want questions during the speech? after the speech? written questions? Speaker should announce this in advance.

What to do if someone in the audience decides to verbally attack the speaker:

Speaker may well be able to take care of her/himself.
Leader may feel the need to intervene and try to limit the attack.

# IV. EVALUATION AND FOLLOW-UP

## A. EVALUATION

Why evaluate?

To determine to what extent the workshop has met its planners' objectives.

To determine to what extent the workshop has met the objectives/ expectations of the participants.

To find out how you can improve your next workshop. (Often an evaluation one day can change the next day's agenda.)

As a courtesy, and often a requirement, funding agencies need/want program evaluations. e.g. LSCA guidelines require that all ongoing services of federal projects be evaluated by the users of the services.

Ways to evaluate:

Ask questions of the group before it disperses.

Distribute a printed questionnaire to each participant at the end of the program. It is best to collect these on the day of the workshop.

Send printed questionnaire to each participant after the workshop. This provides time for a considered response, but some forms will not be returned.

Conduct oral interviews, in person or by telephone, with those who attended.

IV. EVALUATION AND FOLLOW-UP, continued

A. EVALUATION, continued

Written questionnaires and oral interviews should:

1. Include both "yes and no" questions and "open-ended" questions.

   "Yes and no" questions provide answers to specific questions, and are easy to tabulate. They take little time or effort to answer; therefore most participants will respond to them.

   Example: Do you now feel able to use Moody's Industrials?
   ___yes ___no ___with some more study

   "Open-ended" questions are difficult to correlate, but they allow people to express their reactions freely. They take time and effort to answer; therefore not everyone will respond to them.

   Example: What did you particularly like about this workshop?

2. Measure efficiently. They should be as short as possible, while asking for as much information as is needed.

3. Provide valid answers.

4. Provide useful information.

IV. EVALUATION AND FOLLOW-UP, continued

B. FOLLOW-UP

Write thank you notes to speakers and to those persons outside of the committee who helped in workshop planning and implementation.

Pay all bills.

Add your own notes to the master file--mistakes made, costs, suggestions if workshop is to be repeated, etc.

Proceedings. Will you need/want to do proceedings?

If so, who will edit them?

Who will print them?

Who will distribute them?

Will they be distributed free, or will there be a charge?

If there is a charge, who will handle orders and keep track of the money received? Decide whether to ask persons requesting proceedings for self-addressed, stamped envelope (specify size of envelope, amount of postage).

Will you advertise their availability to persons who did not attend the workshop?

There could be some provision for a "follow-up" at a later date (6 months) to determine the efficacy of the workshop--spot check, questionnaire, etc.

# V. SOURCE LIST

Materials consulted in preparing this outline

Conroy, Barbara. *Staff development and continuing education programs for library personnel: guidelines and criteria.* Western Interstate Commission for Higher Education, January 1974. 23 pages.

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* * *

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